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ABSTRACT

Since the 1980s there have been several attempts in the United States to depart from the single-salary schedule in place since the 1920s and to apply performance-related or merit pay (PRP) to teachers, assessed either at the school level or individually. Meanwhile, in England, a performance-management process is now being implemented that is also a major departure from the manner in which salaries have been calculated. This paper discusses why work advocating PRP in the United States is relevant to a discussion of the same process in England, despite their differences. It looks at the use of history made in that literature before providing a historical account of teachers' pay in England. This work also discusses the background of PRP in England and describes its main features. Much of the argument in favor of PRP rests on the view that a historical change is taking place in the nature of work and the structure of organizations. This paper points out that the changes form a normative model identical to that proposed by post-Fordism. Teachers in England are very demoralized, evidenced in falling recruitment rates and problems with retention. An increasing number of teachers are deciding neither to enter nor to stay. Under the new contracts, uncertainty created by reward and performance-management strategies add to the insecurity created by lack of job tenure. (Contains 8 pages of references.) (DFR)

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Using And Abusing The Past: The Use Of History In The Performance Related Pay Debate

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Introduction

Performance related or merit pay for teachers is an idea whose time has come both in England and in the United States. Since the 1980s, there have been several attempts in the United States to link teachers' pay to performance, assessed either at the level of the school or individually and to depart from the single salary schedule that has been in place since the 1920s. In the US, teachers in Cincinnati have recently voluntarily consented to a salary scale determined solely by performance(Marcus, 2000, Blair, 2000). Meanwhile, in England a performance management scheme is now being implemented and this is also a major departure from the way salaries have been calculated since the 1920s.

Counter to postmodernist notions that it is impossible to tell truthful accounts of the past I shall seek to show that the current state of historical knowledge while fallible, as is any other knowledge within social science, (Sayer, 2000) is still sufficient to permit adjudication between different accounts on the grounds of their accuracy and that the importance of being able to distinguish between accounts lies in the consequences that stem from them.

I shall first discuss why work advocating PRP in the US is relevant to a discussion of PRP in England despite the differences in context. I then go on to look at the use of history made in that literature before providing an historical account of teachers' pay in England. Next I discuss the background to PRP in England and describe its main features. In order to evaluate the allegations made by the largest teacher union that PRP is the same as payment by results I shall give an account of that system and discuss its similarities as well as its differences from PRP. Much of the argument in favour of PRP rests on the view that an historic change is taking place in the nature of work and the structure of organisations. I shall attempt to show that the changes form a normative model identical to that signified by post-Fordism. In my conclusion I shall reflect on the use and abuse of history made by the antagonists in the debate over PRP.

Policy borrowing and policy transfer

The current New Labour government in the UK, like its Conservative predecessor, has shown itself, across a wide range of social policies, to be more than willing to borrow from the US. It has also, which to a large extent tends to amount to the same thing in the case of the US derived 'new pay'(Armstrong, Institute of, 1999:14-17), shown that it is eager to transfer

practices from business to public sector organisations. Over the last four years many of the polices so borrowed have been subsumed by the 'third way' label (Giddens, 1998, Giddens, 2000) which both in the US and the UK has sought to give intellectual credibility to left leaning governments' continuation of their predecessors' neo-liberal policies. In the specific case of performance related pay (PRP), an impression has been created by its advocates such as the senior education journalist, Bob Doe, that, 'there is … evidence in the United States that rewarding good teacher performance can be made to work' (Doe, 1999). This, 'made in America' label has been reinforced by reports that the UK government has depended heavily for advice on Allan Odden from the University of Wisconsin, a prominent advocate of performance based alternatives to the single salary schedule for teachers (Conley and Odden, 1995, Mohrman Jr, Mohrman, 1996, Odden and Kelley, 1997, Milanowski, Odden, 1998, Odden, 2000). In one account that appeared in the education press, Odden was even said to have been involved in secret talks with UK officials prior to the announcement of the government's plans (Hinds, 1999). Moreover, he has also been viewed in an editorial in the leading weekly for teachers in England[1], The Times

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[1] Devolution has tended to widen already existing differences between the education systems of the nation regions of the United Kingdom. For example the McCrone

Education Supplement, as being the author of the performance related pay scheme for teachers which is just being implemented in England (Anon, 2000). In addition, the UK government hired the US-based company, Hay McBer Management Consultants to identify effective teaching in English schools in order to define the competencies that could be used to appraise staff and assess their eligibility for performance related pay (Dean and Rafferty, 1999). This exercise, if it does not directly draw upon, certainly parallels the creation of the National Board for Professional Teaching Standards in the US (Odden, 2000).

A key aspect of Odden's argument in favour of merit based pay is that what worked in the past regarding reward schemes is no longer appropriate. In order for this case to be made a representation of the past history of teacher reward policies is required. Likewise, opponents of performance related pay in the US and England have also turned to the past to show that the current performance pay schemes are, in essence, the same as what in the Nineteenth Century became known in England as 'payment by results' (Wilms and Chapleau, 1999).

Committee in Scotland has not adopted pupil progress as a criterion for judging the performance of teachers.

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It will be argued that these versions of the past play important rhetorical and legitimising functions in the discourse of both proponents and opponents of performance pay schemes for teachers. The one associated with Odden presents a myth of origins while some teacher union leaders play upon folk memories of payment by results. The accusation that the current PRP scheme is a throwback to payment by results is made most frequently by leaders of England's largest teacher union, the National Union of Teachers. (NUT) In this it is being consistent with the aims of the founders of its forerunner, the National Union of Elementary Teachers (NUET) as one of its founding objectives was the abolition of payment by results (Tropp, 1957).

In addition to being concerned with PRP, this paper aims to contribute in a small way to the debate on the status of historical study and its relation to the education policy process. Recent, reflection on the historical study of education on both sides of the Atlantic (McCulloch and Richardson, 2000, Richardson, 1999a, Richardson, 1999b, Donato and Lazerson, 2000) have indicated that history of education has become marginalised in recent years. This despite the frequent use of historical perspectives to legitimise policy prescriptions and the tendency for these perspectives to suffer from distortion (Brehony, 1997). From the historians of education's side there is

a disinclination to become involved with policymaking as it lays them open to the charge of 'presentism'. That is that the engagement by historians of topics of interest to policymakers leads them to study the past not for its' own sake but for reasons to do with their interests in the present.

Wisconsin History

Although Allan Odden has been singled out in the press in England as the author of PRP for teachers, his recent work on teacher compensation has arisen out of the Consortium for Policy Research in Education (CPRE) Teacher Compensation Project based at the University of Wisconsin-Madison. In much of the published work that has emanated from the project attention has been paid to the historical evolution of compensation schemes. In their book, Paying teachers for what they know and do which was held by the Times Educational Supplement to have had, 'a profound impact on the UK Government's thinking,' (Anon, 2000) Odden and Kelley provide a three stage periodisation of the history of teacher compensation.(Odden and Kelley, 1997) In the 1800s, boarding 'round, a system whereby teachers were given free board in the homes of their pupils was the dominant form. At the end of the nineteenth century, this system of compensation was replaced by a grade or position based salary schedule. Under this system,

pay was based on the grade taught, on experience and on the gender and 'race' of the teacher. Beginning in the 1920s, this system was replaced by the single salary schedule under which a teacher's salary was calculated according to their experience and level of academic preparation.

The accuracy of the representation of the history presented by Odden and his colleagues is a central issue. For postmodernists the possibility of assessing accounts according to their veracity is ruled out. It is not simply a question of putting the historical record straight either for its own sake or in the interests of some absolute notion of truth. I do not wish to downplay the importance of these objectives but the main question here, given that Odden and Kelley are not historians and thus presumably are not interested in the past for its own sake, is that of what they are trying to achieve in their historical accounts. Their histories might be regarded as the base upon which the superstructure of their argument for merit pay has been built. If this is the case and their account of the history of teacher reward schedules is flawed then their general argument and its associated prescriptions is weakened. Alternatively, the historical accounts may be simply a legitimising move for policies on teachers' pay that they wish to see implemented.

In a review of teachers' salaries written in 1913 by Edward C. Elliot, who, coincidentally was also at the University of Wisconsin, he claimed that prior

to 1800 teachers received free board but they also received a salary. (Elliot, 1913a) Admittedly this was generally rather meagre but Odden and Kelley under-emphasise its part in the reward teachers received. Elliot said nothing about a grade or position based salary schedule, the bulk of his discussion being concerned with the difficulties attendant upon trying to give an account of teachers' salaries in a decentralised system. He divided his presentation of salary levels by gender and by whether they were city or rural schools. Regarding the former, he noted the tendency of the majority of urban school systems to have established graduated salary schedules. He suggested that these were introduced for two reasons. Firstly, the necessity of 'providing a stimulus for permanency of the teaching corps' and secondly, as a ready device for promotion.(Elliot, 1913a: 510) Although in most of these schedules promotion was based on service and was thus automatic in some cities a merit element was also included. This was, 'based upon special inspections and ratings of teaching accomplishment or upon the presentation through formal examination or otherwise of evidence of further professional study or acquirement'.(Elliot, 1913b:505) That merit reward schemes for teachers have previously been tried in the past and have failed is recorded by Odden and Kelley(Odden and Kelley, 1997) but the schemes discussed by Elliot for promotion by merit tend to have been written out of Odden and

Kelley's history in order perhaps to reinforce their representation of the hegemony of the single salary schedule.

The idea that all historians are interested only in the past is of course one that is open to challenge but leaving that aside, the intention of Odden and Kelley's history is fairly transparent. It proposes that significant changes have occurred since the introduction of the single salary schedule that renders it inappropriate for the changed conditions of contemporary schooling. Among the dimensions they pinpoint as having changed are school organization, the roles of teachers and, significantly for the English context, 'an increasingly internationally competitive environment'.(Odden and Kelley, 1997: 36). Regarding school organisation, Kelley expanded on this aspect of change in a separate article.(Kelley, 1997) She distinguished four models of schooling that could be identified since the 1950s. Claiming somewhat problematically that, 'policy makers and administrators use organizational theory to design and manage schools' (Kelley, 1997: 17) she described the respective characteristics of the scientific management, effective schools, content-driven and high standards/high involvement models.

It is noticeable that very little evidence for these models being anything other than models is put forward. They do not appear to have been derived

from empirical evidence as none is provided. No account is given of how one form of organisation is supplanted by another or when, other than in the most cursory way. All this is consistent with the philosophically idealist contention that the models drive change rather than the models and the things they seek to describe being in a constant dialectical relationship. The conclusion of the Wisconsin historical excursus is that the single salary schedule is no longer appropriate to current and foreseeable organisational forms.(Odden and Kelley, 1997:43) In order to arrive at this conclusion, the single salary schedule is presented as the concomitant of the scientific management model. As Kelley explained, 'the single-salary schedule was appropriate for the bureaucratic, hierarchically organized school of the first half of this century.' (Kelley and Odden, 1995) The implication of this observation is that schools are no longer bureaucratic and that,

> Today's education reforms expect teachers to acquire the professional expertise needed to teach a "world class" curriculum well to the diverse students in schools. Today's teachers also are being asked to take on broader leadership roles in school management, organization, and instruction. And more than ever, today's teachers are being asked to focus

on results--student achievement--in addition to education processes(Kelley, 1996).

In other words, major changes in the organizational needs of schools have emerged and a revised teacher-compensation structure could help to address these new and more complex system needs.(Kelley, 1996)

It is fairly clear from this that the high standards/high involvement is a normative model. It contains what Legge referring to the flexible firm describes as a, 'covert ideological agenda embodied in the model as prescription'.(Legge, 1995:153) That agenda corresponds closely to at least one element of an ideological position which in England has been termed, 'new managerialism'. (Clarke and Newman, 1994, Clarke and Newman, 1997, Clarke, Gewirtz, 2000) A key aspect of this is the view that public services are inefficient and that in order to reform them practices common in the private sector, such as PRP, should be implemented.

Paying Teachers in England

Even if the Wisconsin history was a plausible representation it would not be reasonable to expect the history of teachers' pay in England to closely resemble that of teachers in the US. Contexts are all important and from

them arise specificity. There are, however, some parallels relating to the origin of the single salary schedule in England.

After the introduction of the Revised Code in England in 1862 all elementary school teachers had their salary determined by the managers of their school. The managers received a grant from the state under the system of payment by results which I will discuss in more detail below. To this was added the fees paid by pupils and from this income teachers were paid. When the state entered the field of school provision through the 1870 Education Act, popularly elected school boards were established across the country (Brehony, 1985, Hollis, 1989, Martin, 1999). These bodies could levy a rate and thereby raise the funds to 'fill up gaps' left by the voluntary societies who were unable to build sufficient schools by themselves. Organised teachers under the large urban school boards were able to negotiate higher salaries than those paid in the voluntary schools or the schools under rural school boards (Gosden, 1972). After the Education Act of 1902 which abolished the School Boards and established Local Education Authorities, local associations of the National Union of Teachers (NUT) negotiated progressive salary scales with Local Education Authorities. Following a number of disputes with Local Education Authorities and strike action in Herefordshire over that authority's initial refusal to introduce a

salary scale,(Lawn, 1987: 41-46) in 1913 the NUT launched a national campaign to secure a union salary scale. The scale, argued the union, 'should recognise the many years spent by the teacher in training for his office, and the responsibilities and obligations he has subsequently to discharge' (Gosden, 1972:26).

Their governors paid teachers in the endowed secondary schools, prior to 1902, from fee income and their endowments. Many of them had little money and so salary increases were impossible. Moreover, as Gosden noted, the sheer multiplicity of the employing bodies in the secondary sector made almost impossible any negotiation of a salary scale (Gosden, 1972:23). After 1902, the regulation of secondary schools became the responsibility of the new Local Education Authorities and the secondary teachers associations began a campaign to persuade the LEAs to introduce salary scales which included provision for increments. In addition, the higher salary scales should, said the Assistant Masters, be open to those teachers, 'who are specially qualified by attainment or experience'.(Gosden, 1972:29)

Towards the end of the First World War, teacher militancy increased sharply. In the Rhondda in Wales in 1919 teachers struck for and won for the first time, the implementation of the Union Salary Scale (Lawn, 1987:49-55). Fearful of the consequences of the adoption by organised teachers of

militant tactics and of what was later described as their 'drift' to the left (PRO ED 24 1757), the government in 1917 had established two departmental committees to enquire into the principles which should determine the construction of salary scales. When the committees reported in 1918 neither the one for elementary teachers nor the one for secondary teachers recommended the adoption of national scales.(Gosden, 1972:37) The chief objection was grounds of cost. Meanwhile teacher militancy increased and together with a shortage of qualified teachers produced sufficient pressure on the Local Education Authorities' organisation, the Association of Education Committees (AEC) for that body to declare its support for national salary scales for elementary and secondary teachers. Pressure from the AEC for a committee at which its members and representatives of the teachers' organisations could prepare a national scale led the government to set up the Standing Joint Committee on Salaries. By 1921, this tripartite negotiating body, known as Burnham after its first chairperson, had produced national scales for elementary and secondary teachers.(PRO ED 108/11) Gosden has argued that it is not entirely accurate to see this outcome as the result of a successful struggle by organised teachers.(Gosden, 1972:40) This is because the LEAs were in favour of it and the NUT was united in pursuit of a national scale as many of its

members feared that a national scale would lead to a reduction in their salaries.

Space precludes a detailed consideration of the history of the attitude of organised teachers inn England to the single salary schedule but some points deserve emphasis. Firstly, the scales that were produced by Burnham supposedly took account of regional variations in the cost of living. This device reduced the burden on local authorities that could not afford the rates paid in the large cities. Secondly, after the Geddes' cuts of 1921 some local authorities tried to break the Burnham agreements, which led to further teacher militancy. As Lawn has pointed out, it was union action that defended Burnham (Lawn, 1987:101-14) which supports the case that organised teachers were instrumental in the emergence of a single salary schedule.

In the aftermath of the Second World War the teachers' associations forged a short-lived unity around the demand for a basic scale fixed for all qualified teachers. They argued that any departures should be justified only by level of qualification and appointment to a post of special responsibility.(Gosden, 1972:65) Divisions among teacher organisations in England have been present since the state began to establish a national system of education. Conflicts relating to sector, gender and qualification have all weakened the

bargaining power of teachers and they soon began to undermine the unity attained in the immediate post-war period. LEAs and the apparatus of the state, in order to stave of crises in recruitment and to attract highly qualified teachers, also promoted salary differentials. At the same time, the government increased its role in determining levels of teachers' pay for reasons of economy and also for recruitment.

National pay bargaining on Burnham ended when the Conservative government at the end of a protracted pay dispute in the late 1980s abolished it. A contract specifying pay and conditions was imposed on teachers by the Secretary of State and the School Teachers' Review Body (STRB) was established under the terms of the School Teachers' Pay and Conditions Act 1991 to make recommendations on teachers' pay The STRB is an unaccountable quango. Its official description is as follows and it is probably not insignificant that relevant knowledge of education comes last on the list.

> The Review Body may have a maximum of nine members appointed by the Prime Minister. They are generally drawn from senior positions in business and the professions. Some relevant knowledge in the areas of human resources and industrial relations, financial management or education is an advantage, but the main attribute required of members is the

ability to contribute to the development of balanced and workable recommendations on complex and sensitive national issues.

(http://www.dfee.gov.uk/teachingreforms/rewards/teacherspay/)

Teachers' representatives have no place on the STRB and neither have they a place, unlike some cities in the US, (Lawn, 1996) in the restructuring of the education system. This raises questions about the nature of the reforms currently being pursued in England and whether or not they look anything like the high standards/high involvement model advocated by the Wisconsin researchers.

A brief history of performance related pay in the UK

According to Armstrong, one of the leading experts on employee reward in the UK, PRP emerged as a panacea for motivating employees and developing performance-oriented cultures during the 1980s. It was, he observed, adopted by the Thatcher government 'with much enthusiasm, but little understanding, as a means of transforming public sector bodies into businesses'.(Armstrong, Institute of, 1996:239) In other words, it was a key item on the Thatcherite neo-liberal agenda and was aligned with the central

neo-liberal belief that the private sector was good and the public sector bad. In 1991, the Citizen's Charter (Cabinet Office, 1991) signalled the government's desire to introduce PRP into the public sector. Every year from 1993 the STRB was given the remit by the Conservative Secretary of State for Education of considering how to ensure that teachers' pay be related more closely to individual performance. The first step towards introducing PRP for teachers was taken in 1998 when increases in the pay of heads and deputies was made contingent upon a review of their performance by their school's governing body (Cutler and Waine, 1999).

In 1992 a book edited by Tomlinson was published which advocated the adoption of PRP for teachers. (Tomlinson, 1992a) That Tomlinson is now centrally involved in the training of the experts who are advising head teachers and governors on who should get PRP exemplifies the often-close alignment between material interest and ideology. For Tomlinson, 'performance-related pay is part of a necessary change to school and college culture, if standards are to be raised significantly without a massive and possibly wasteful input of new resources'.(Tomlinson, 1992b:2) Teachers' resistance to PRP is dismissed as is their adherence to a, 'nineteenth-century model of professionalism' and their 'continuous whining' about lack of resources for school improvement(Tomlinson, 1996). Odden and his

colleagues are not cited in Tomlinson's collection. Their research on PRP had not yet begun in earnest.[2] Nevertheless, a chapter in the book looked at PRP for teachers in the US (Jacobson, 1992) and Tomlinson saw certain parallels between the situation in the US and the UK. He wrote, 'there is an increasingly desperate anxiety in both countries to screw more value out of the decreasing amounts money on education....' (Tomlinson, 1992c:204) Arguably, the decreasing amount of money was due to the pursuit of neo-liberal policies or Reaganomics but Tomlinson also detected a change in organisational structure that was to provide a further legitimating rhetoric for PRP. 'The line management and human resource function has become eroded by the increase in efficiency of communication made possible by information technology... The flatter organizational profile means that new methods of assessing responsibility and performance will have to be found.'(Tomlinson, 1992b:14) 'Organisations', he claimed, 'have become stretched horizontally with a wide range of more flexible employees, offering unique skills and specializations.' (Tomlinson, 1992b:13)

New Labour accelerated the new managerialist drift that was associated with the aim of rolling back the state and liberalising conditions for the private

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[2] Odden in the early 1990s was writing mainly about devolved finance and school management

sector when, following its substantial electoral success in 1997, it formed a government. Characterised by some as pursuing, 'corporate populism' (Barnett, 2000) the New Labour government pressed ahead with the privatisation of schools and local education authorities and the wholesale importation into the public sector of business practices such as target setting. Nevertheless, New Labour's approach to public services was nuanced in a slightly different way to that of their Conservative predecessors. As Waine has argued, for the Conservatives, improved performance in the public services was to be achieved through the introduction of aspects of the market to which performance measures were added. Under New Labour the focus has been less on quasi-markets and more on performance measurement and management.(Waine, 2000)

In 1997 the government published a White Paper entitled Excellence in Schools which outlined its plans for the education system. Like much of New Labour's policies the White Paper was predicated upon largely unexamined assumptions about globalisation. The central problem identified was that, 'by comparison with other industrialised countries, achievement by the average student is just not good enough' (Great Britain. Dept. for Education and Employment., 1997: 10). Specifically, the White Paper mentions challenges from 'Pacific Rim' countries and other international

competitors. These framing assumptions, which see education largely in terms of human capital formation and a weapon in an international struggle for survival, are not new in the politics of education. (Brehony, 1998) What is novel about New Labour's presentation is that globalisation sets imperatives that may not be questioned.[3] Imperatives such as initiatives for school reform that put the restructuring of teachers work at their centre. Performance management but not PRP was discussed in the White Paper with a strong emphasis on leadership and tough talk about incompetent teachers.

The government's plans for 'modernising' the teaching profession were published in December 1998 in a Green Paper entitled, Teachers: meeting the challenge of change. In common with the rest of New Labour's policy pronouncements the Green Paper contained genuflections to 'leadership' and 'flexible'. New technology is referred to frequently as is 'new professionalism' and modernisation. It is clear that the government intended a culture change in the directions charted by 'new managerialism'. Teachers,

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[3] For example this is from a speech The National Association Of Head Teachers at Cardiff in 1999. 'The rise of the global economy, with fewer and fewer barriers to mobility, has changed the whole basis on which nations secure their prosperity. Sector by sector, countries compete on the quality and flexibility of their skill base. By flexibility, I mean the capacity of people to acquire new skills, fast, throughout their careers, building on a high level of general education acquired at school.'

declared the Green Paper, were to become 'managers of learning'. (DfEE, 1998:14)

The Green paper contained proposals for four PRP schemes were proposed. These were two schemes for teachers, one for heads and an award for schools. There were 41,000 responses to the government's Green Paper, the majority of which were opposed to the linking of pay to performance. The NUT, which mainly represents primary school teachers, adopted the most intransigent position of all the teacher unions and threatened strike action against the link between pay and pupil performance. The strikes failed to materialise but In July 2000 the NUT challenged the statutory basis on which the DfEE had promulgated the threshold standards in the High Court. The court ruled that the Secretary of State could not set performance threshold standards until they had been referred to the School Teachers' Review Body (STRB).

Newly appointed teachers are to be placed on a scale according to their qualifications and experience. Unlike previous salary arrangements progression up the scale will not be automatic but dependent on performance review. Teachers who are judged 'able' may be given double increments For classroom teachers on the maximum nine points for experience and qualifications there is a performance threshold, for which they can apply.

Passing the threshold is rewarded by an immediate pay increase of up to £2000 and access to a new upper pay spine, enabling teachers to earn up to £30,000 without taking on management responsibilities. These responsibilities are to be rewarded separately through the award of management allowances. For teachers who have crossed the threshold the award of further points on the upper pay spine is not intended to occur annually (Great Britain. School Teachers' Review Body., Vineall, 2000). All applications for the threshold are judged against a set of national performance standards. The standards cover five areas:

1 knowledge and understanding

2 teaching and assessment

3 pupil progress

4 wider professional effectiveness

5 professional characteristics.[4]

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[4] **The threshold standards in detail are:**
Knowledge and Understanding: Teachers should demonstrate that they have a thorough and up-to-date knowledge of the teaching of their subject(s) and take account of wider curriculum developments which are relevant to their work.

Teaching and Assessment: Teachers should demonstrate that they consistently and effectively:

- plan lessons and sequences of lessons to meet pupils' individual learning needs
- use a range of appropriate strategies for teaching and classroom management

Evidence of pupil progress is the most contentious of these standards as it includes external test and examination results. After consultation the February 1999 standard on "pupil performance" was changed to "pupil progress" and the content changed to make clear that what was sought was an assurance that pupils taught by the teacher applying had, 'made the sort of progress that could be expected of such pupils'.

- use information about prior attainment to set well-grounded expectations for pupils and monitor progress to give clear and constructive feedback.

Pupil progress: Teachers should demonstrate that, as a result of their teaching, their pupils achieve well relative to the pupils' prior attainment, making progress as good or better than similar pupils nationally. This should be shown in marks or grades in any relevant national tests or examinations, or school based assessment for pupils where national tests and examinations are not taken.

Wider Professional Effectiveness: Teachers should demonstrate that they:

- take responsibility for their professional development and use the outcomes to improve their teaching and pupils' learning
- make an active contribution to the policies and aspirations of the school.

Professional Characteristics: Teachers should demonstrate that they are effective professionals who challenge and support all pupils to do their best through:

inspiring trust and confidence
building team commitment.
engaging and motivating pupils
analytical thinking
positive action to improve the quality of pupils' learning.

DfEE 24 March 2000

The threshold assessment is conducted by the headteacher and an external assessor samples the cases. The assessor has the power to override the headteacher in the event of disagreement.(STRB Special Report 2000) In addition all teachers now have an annual performance review in which they agree objectives covering pupil progress and professional development with their team leader.

At the beginning of 2001 the first annual School Achievement Awards were allocated. About 30% of schools received them. There are two categories of award. The Improvement Awards were allocated to schools where pupil performance in 2000 was substantially better than in 1997 and to schools that have come out of special measures, a status determined by OFSTED, the inspection agency. 71% of the schools receiving a School Achievement Award received one in this category. The Excellence Awards were for schools where pupil performance in 2000 was better than most schools in similar circumstances. The decision as to how to share the award between staff is the responsibility of their Governing bodies. They could choose to give it all to a few selected teachers or to all of them.

Restructuring teachers' careers

Accompanying the introduction of an element of PRP is a substantial restructuring of teachers' work (Lawn, 1995) together with the grades of

teacher. The effect of which is to lead to an increasing individualisation of pay determination and a further weakening of the collective strength of teachers that was concretised in the single salary schedule. There is to be from September 2001 a single pay spine for the leadership group, This will bring together headteachers, deputy headteachers, and other senior teachers who have what the DfEE calls 'substantial strategic responsibilities for school leadership'.(DfEE, 2001) A new category of Advanced Skills Teacher (ASTs) is now being introduced. While the designation is the same as that introduced in the Australian State of Victoria in 1995 (Odden and Odden, 1996) the roles of ASTs in England are intended to be different. These teachers are meant to share their skills and expertise with other teachers in their own and neighbouring schools It is anticipated that ASTs will spend 80% of their time teaching and spreading best practice in their own schools. The other 20% is to be spent working with teachers in other schools. ASTs are to be paid on a separate pay spine that allows access to higher salaries. Finally, the Green Paper proposed that 20,000 more teaching assistants should be recruited by 2002 and that they would receive improved training and career development. It is this latter intention that differentiates these

workers from the supplementary and 'Article 68'[5] teachers who constituted a mass of unqualified, mainly women, teachers who filled the infant schools and the lower classes of the elementary schools during the late nineteenth and early twentieth centuries. What they do conform to, however, as did the unqualified teachers referred to above is a core periphery model of employment.(Legge, 1995) It is also likely that, as Menter et. al. argue, the core flexible differentiation in teaching reflects a gender division.(Menter, Muschamp, 1997:116)

Teaching Assistants, formerly non-teaching assistants have been employed in increasing numbers since 1998. The Government takes the view that pay and conditions for teaching assistants are best determined at local level either by the LEA or the schools. Whichever the case, the Green Paper advised that schools should have the flexibility to tailor the Teaching Assistants posts to their own needs.(DfEE, 1998:57) Advice from the DfEE on supporting the Teaching Assistant, observed that, 'the implementation of the National Literacy and Numeracy Strategies has shown, it is now common and desirable for teachers also to allocate TAs tasks that were once more often done by the teacher.' (DfEE 2000: 9)

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[5] Girls over the age of eighteen who had been vaccinated and could satisfy an inspector that they could teach (PP. 1898. XXVI. Royal Commission on the Working of the

Teaching Assistants are not viewed by the DfEE solely as a source of cheap labour on the periphery of the education labour market but in some cases as potential qualified teachers who can take one of several non-standard routes and attain qualified status Such TAs would be equivalent to the not fully licensed teachers envisaged in Conley and Odden's conception of a desirable career and pay structure.(Conley, Odden, 1994) The latter authors' vision of a career structure for teachers exhibits a close similarity to the structure described above in many other respects too. Most noticeable is the stress upon the differentiation of grades of teachers a feature of what Helsby has referred to as, 'the new work order' of teaching (Helsby, 1999).

Payment by results

The NUT in its opposition to PRP has frequently drawn an analogy between it and payment by results. In this section I shall discuss the extent to which this charge is justified. State financial assistance to elementary schooling began in England in 1833. Elementary schooling was a social rather than educational category which was specifically intended for the working class. As now, nineteenth century elementary schooling was expected to produce a number of diverse and often contradictory outcomes. Among the most

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Elementary Education Acts 'Evidence of E. G. A. Holmes HMI'. Q. 4192.)

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prominent of these was the moralisation of the working classes in order to prevent crime and the production of a disciplined work force. Despite these supposed benefits the involvement of the state in elementary schooling in England was strongly contested and, as a consequence, the spread of its involvement was slow. Nevertheless, towards the end of the 1850s the number of grants made to elementary schools had expanded and the sum of money had risen considerably. In 1853 a capitation grant payable to a school on the basis of a pupil's attendance was introduced in selective areas but it was soon generalised and teachers received payment directly from the State.

The Newcastle Commission

It was in this context that in 1858 a Royal Commission was established to, inquire into the present state of Popular Education in England' and to report 'what Measures, if any' are required 'for the extension of sound and cheap elementary instruction to all classes of the people'. (PP 1861 XXI Newcastle Commission, : 4). The phrase, 'if any' signalled that there was by no means unanimity about the desirability of the extension of elementary instruction. A noticeable feature of the current debate identified by Merson is that in the consultation documents 'The assumption is made that many teachers are not working hard enough, their work is not focussed, they are not keeping

up'(Merson, 2000:4) Likewise, the Newcastle Commission was critical of the work of teachers.

> The children do not, in fact, receive the education they require. We have just noticed the extravagant disproportion between those who receive some education and those who receive a sufficient education…So great a failure in the teaching demanded the closest investigation. (PP 1861 XXI: 296)

The main 'failure' in the eyes of the Commission was that the teaching was adapted to the needs of the older pupils and this led to the neglect of the younger ones. 'There is', the Newcastle Commission opined,

> only one way of securing the results, which is to institute a searching examination by competent authority of every child in every school to which grants are to be paid, with the view of ascertaining whether these indispensable elements of knowledge are thoroughly acquired, and to make the prospects and position of the teacher dependent to a considerable extent, on the results of the examination. (Tropp, 1957: 71)

There is here expressed a theory that pupil learning is measurable, is dependent on teaching and that teaching is most effective when the salary of the teacher is made dependent on the assessment of the pupils. While this might be seen to arise solely out of a concern for the extension of sound basic education the Commissioners also took the view that the trained, certificated teacher was dissatisfied with their position. They wrote that boys who would have otherwise gone to work in mechanical trades were being trained at public expense. At the end of their training they obtained a job that required them to teach only five days a week for seven and a half hours and that they had a vacation each year of six or seven weeks. And yet, the Commission declared, 'they seem to complain that they are not provided with still further advantages, on a progressive scale, throughout the rest of their lives'. (Tropp, 1957:72) This resentment among teachers at their being no chance of promotion was due thought the Commission, to the fact that the remuneration of teachers 'begins too early and rises by too steep gradients'. If there is a historical lesson relating to PRP to be learned from this it is that teachers, along with other public sector workers have been motivated to a large degree by the promise of job security and promotion to higher salary points on a clearly defined scale. In this era of enthusiasm for flatter organisational structures (Odden and Kelley, 1997, Menter, Muschamp,

1997) it is salutary to encounter this comment from 1854 regarding the educational profession which was characterised as, 'dead level…at the best a dull tableland which, when you have once surmounted, you have no other rise before you and look forward to going down wearily at its end'.(Tropp, 1957:40)

The Revised Code

The recommendations of the Newcastle Commission gave rise to a protracted debate before the system of determining teachers' pay known subsequently as payment by results was introduced in 1861 with the publication of the Revised Code. Direct payment to teachers was abolished and teachers were given a centrally dictated specification of what each pupil should know at the end of each of six Standards, the organisational units that elementary schooling was sub-divided into. In order for the school managers to gain a grant from the State out of which to pay their school's teachers the pupils had to satisfy an attendance criteria and one of pupil progress as assessed through the annual examination of each pupil by HMI (Her Majesty's Inspectors). Grant was lost for every pupil who failed the examination in the subjects of reading, writing and arithmetic.

The Cross Commission on payment by results

In 1885 the new Conservative government established a Royal Commission on the Working of the Elementary Education Acts. The main political issue that it was intended to help resolve was the denominational one. The voluntaryists wanted funding for the denominational or voluntary schools. The Minority, which represented the Liberal/Nonconformist bloc, opposed this but the Commission's Anglican/Tory Majority recommended that they be supported out of the rates. Despite this overriding concern the Commission could not avoid taking evidence on the payment by results system

The hostility felt by organised teachers is captured in this extract from a Memorial submitted to the Cross Commission by the NUET,

> the most important results of school instruction cannot be measured; that mechanical results are elevated above those which are educational, and that, in consequence, a false gauge of efficiency has been set up; that the system has injured the classification of schools and the methods of teaching; has debased educational ideals and demoralised all who have come under its influence; that it has created suspicion and mistrust between inspectors and teachers, and destroyed that

harmony of work and purpose between them which is essential to educational progress.(pp. 1888. XXXV. Royal Commission on the Working of the Elementary Education Acts. Final Report: 180)

The evidence taken by the Commission from teachers was overwhelmingly hostile to payment by results, as was the evidence of some of the school managers. One however who was cited in the Final report, argued for its retention as it was the, only true guarantee the State can have that the education given is efficient...'(pp. 1888. XXXV. Royal Commission on the Working of the Elementary Education Acts. Final Report: 181) This was an argument that seems to have persuaded the Commission's Majority as it recommended that payment by results be not abolished but 'modified and relaxed'.(pp. 1888. XXXV. Royal Commission on the Working of the Elementary Education Acts. Final Report: 183) The object of all expenditure, asserted the Commission was the securing of adequate results In this case, the result desired was the 'efficient conduct of elementary schools'. Abolition risked 'graver evils' than it had heard of from the opponents of payment by results and that it predicted that Parliament would not continue to pay the annual grant to schools at current levels unless it could continue to satisfy itself, 'that the quality of the education given

justifies the expenditure'. (Great Britain. Royal Commission on Elementary Education Acts., 1888: 183)

Historical parallels are alluring and seductive but also dangerous as it is very easy to elide the differences in context that divides one period from another. Only elementary teachers were subjected to payment by results, for example, and today's PRP contains provision for schools to gain awards whereas under payment by results the grant was dependent on individual examination. The current manifestation of PRP stresses the necessity for teachers' professional development but payment by results was meant to prevent teachers rising above their station. Nevertheless, the introduction of the Revised Code by making the distribution of the grant the responsibility of the school managers was an act of decentralisation rather like the post 1988 move to devolved budgets and local site management of schools. Also of contemporary resonance is the fact that while the state devolved the payment of teachers to the school level it promulgated the curriculum or a centrally prescribed set of indicators against which to measure teachers' performance(Gordon, 1974: 39) One important consequence of this was that managers, like today's school governors who have a role in the allocation of PRP, had no control over the criteria used to determine the performance of teachers. Moreover, the assault on public sector or bureau professionals

(Mintzberg, 1983) that commenced in England during the 1980s was, in part, accompanied by a legitimising rhetoric of setting the public services free from 'producer capture' or control by professional vested interests. In education, strategies to attain this end include the introduction of the regular inspection of schools by the Office for Standards in Education OFSTED, an agency established in 1992. Ostensibly its objectives are to, 'improve standards of achievement and quality of education through regular independent inspection, public reporting and informed independent advice'.(http://www.ofsted.gov.uk/about/index.htm) Its activities, however, have been frequently seen in a different light by others who complain of its punitive methods and the effect they have on schools.(Cullingford, 1999) Robert Lowe, the man widely regarded as the architect of the Revised Code, also wished to reduce the power and control of those who worked in the education system arguing that if it were not reduced no Ministry would dare refuse any demand they might make on the public purse.(Tropp, 1957: 88) Against those managers who were opposed to the introduction of the annual examination to be conducted by HMI, he argued that its object was not, 'simply to make things pleasant, to give the schools as much as can be got out of the public purse, independent of efficiency'. (Tropp, 1957: 88) Likewise, the present Prime Minister argues in support of PRP that he wants

the education service to receive more public money but cannot justify this unless the profession accepts what he calls 'modernisation'.[6] (Eason, 1999) The NUET argument that, 'the most important results of school instruction cannot be measured' finds a resonance in today's literature.(Armstrong, Institute of, 1999:270-71, Legge, 1995:167, Cutler and Waine, 1997: 29-53) This difficulty may also account for the complexity of the current threshold arrangements in England. While payment by results carries an ideological charge for the NUT it is also fairly obvious that its historical significations are seen as threatening to its project by the government. Repeatedly, ministers have argued that while their PRP scheme contains a link between pay and pupil performance, it is not payment by results.[7] This is also the verdict of Storey who wrote that, 'The plan for change as set out in the Green Paper and its supporting technical documents is by no means a simple and

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[6] The Prime Minister, Tony Blair told headteachers that there was "serious money" on offer but there had to be "serious reform" in return. Only if that happened would voters see that it was possible to improve things and - if there were a re-elected Labour government - there would be a strong case for education getting even more money. "We simply cannot justify such an exceptional investment unless it is tied to a significant return," he said. "It has go to be used in some way to lever up standards and performance and there really would not be public consent for it otherwise.

[7] School Standards Minister Ms Morris also emphasised the linking between pupils' results and pay - but promised that this would not be a "simplistic Victorian approach to payment by results but would recognise that different classes had different starting points".

straightforward PRP scheme. The proposals cannot therefore simply be dismissed by a traditional critique of PRP'.(Storey, 2000:5)

A major problem for the government is that in seeking to avoid the crude performance measures of PRP it has created a highly labour intensive and costly system of performance management. Here might lie the seeds of another historical parallel as payment by results was effectively ended in 1895 not only as a result of the opposition of organised teachers but also on grounds of cost. As the number of elementary schools grew and with them the number of pupils to be examined so to had the number of inspectors. The system virtually collapsed under the strain of its own weight. Around 250,000 teachers are eligible for the threshold in England alone and despite the hostility of the major teacher unions to PRP about 197,000 teachers applied. In future years the number of applicants should decrease but the burden on all concerned in the process is substantial. There is a certain irony, given the arguments of the Wisconsin team, that the threshold process has become highly bureaucratic. The DfEE,

> recognised the concern amongst teachers and headteachers' representatives about the time involved in filling in and assessing applications. These concerns were addressed as far as the Department felt appropriate by simplifying both form

> and process.... But the Department felt that a structured approach was required to ensure that the significant sums of additional public funds earmarked for extra pay for good teachers would be correctly spent. (Great Britain. School Teachers' Review Body., Vineall, 2000 : 28)

The need to secure value for money it would seem has a certain timeless quality to it.

Fordism and post-Fordism

In the history of teachers' reward policies in England as in the US a break may be identified as occurring when the single salary schedule or incremental scale was introduced. The advocates of PRP in the Wisconsin team and Tomlinson in England have identified a more recent break which, in their view, renders obsolete the single salary schedule. I have described some of the features of what Odden and Kelley call the high standards/high involvement model (Odden and Kelley, 1997) above. I have also noted their argument about the single salary schedule being an inappropriate reward scheme for this model. Here I want to point to the similarities between this model and what is referred to as post-Fordism (Legge, 1995:142-153) Post-Fordism, as Cutler and Waine point out, refers to two different things.(Cutler

and Waine, 1997:151) The first usage signifies a production process whereas the second, a mode of regulation and accumulation. Both versions have been held to have effects on public sector services(Burrows and Loader, 1994) as the shift has occurred from Fordist organizations producing standardised goods by means of inflexible production processes under Taylorist management. Post-Fordism signifies the opposite in that it refers to decentralisation, flexibility and the widespread use of information technology (Whitaker, 1992). The problem with either version of post-Fordism as, Cutler and Waine have pointed out, is that while there are undoubtedly changes in the way work is organised and the information technology is becoming central to the functioning of organisations there is a distinct lack of evidence of the changes indicated by the term post-Fordism. Historians also require evidence. Being primarily concerned with phenomena in time they routinely seek to chart transitions from one phenomenal form to another and in this respect the histories of Odden and his associates are singularly lacking.

As has been seen, writing in the early 1990s, Tomlinson was able to describe the shift in the structures of organisations but admitted with the exception of secondary schools these changes had not yet occurred in teaching (Tomlinson, 1992b:13). The Oddens, on the other hand, detected changes in

changes in schools in Australia, like decentralisation and teamwork that indicated they were moving toward a high involvement framework but admitted, in a way that suggested that the changes were politically driven, that they could only be certain that the reforms were long lasting if they survived a change of government.(Odden and Odden, 1996) From a very different perspective, Menter et. al. studied identity and work in English primary schools to see if the changes in work that go under the label of post-Fordism connected to primary schoolwork. In their theoretically provocative argument post-Fordism is taken as having been established even though the authors recognise that such an epochal change is a contested assumption.(Menter, Muschamp, 1997:) More convincing than their claims about the effects of post-Fordism are their observations on Human Resource Management (HRM) discourse and the gap between it and 'the covert coercion of the new management' in the schools.(Menter, Muschamp, 1997:115) A similar point is made by Cutler and Waine who suggest that rather than the employee empowerment of post-Fordist theory, 'there are numerous examples of more authoritarian forms of management operating'.(Cutler and Waine, 1997:156)

Rather than post-Fordism being a description of what is happening to organisations much of what the term signifies is a normative model. Such is

the power of language to constitute as well as reflect reality that the discourse is sometimes taken for the real. Nevertheless, it is clear that there are social forces promoting such changes. The STRB, for example, expressed the hope that the new pay arrangements for teachers would lead to, 'flatter structures, based on teamwork' (Great Britain. School Teachers' Review Body., Vineall, 2000: 24). In the light of this it is difficult to dissent from Legge's summation of HRM, the tenets of which are to be found in the work of Odden, Tomlinson and New Labour, that, 'as both a rhetoric and a series of initiatives is very much a product of the New Right's, 'enterprise culture' (Legge, 1995:338) Thatcherism, the sponsor of the enterprise culture, was also the ground in which the idea of PRP took root and it is quite possible to see with Legge its symbolic value, 'as part of a cultural change programme, signalling a move away from bureaucratic values'.(Legge, 1995:168)

Conclusion

It is widely accepted that teachers in England are very demoralised(Helsby, 1999). The evidence for this perception is to be found in falling recruitment rates and problems with retention. The relation between these and the restructuring of teachers' work in recent years is difficult to ascertain. Some

think that it is very close (Ozga, 2000) but even if so it is difficult, if not impossible, to disaggregate the effects of PRP from that of the other initiatives aimed at restructuring the education system in England. In the nineteenth century, teachers actively struggled against payment by results. As has been seen, although opposition to performance related pay is widespread among teachers according to surveys there is little overt collective opposition. What appears to be happening is a mass of individual decision-making about whether to enter teaching and if within it whether to stay and an increasing number are deciding neither to enter nor to stay.

It is perhaps the case that the proponents of PRP have misread the reasons for the attraction of the single salary schedule and the bureaucratic careers associated with them. Odden and Kelley recognised the way in which the single salary schedule produced relative equity and objectivity. But they failed to consider that, 'professional culture, bureaucratized and gendered, provided considerable solidarity and constructed identity'.(Menter, Muschamp, 1997:9) As Beardwell and Holden contend, under the old contract, 'hard work and loyalty were given in exchange for job security, stable career progression, and steady and predictable rewards'. Under the new contract, they suggest, 'uncertainty created by reward and performance management strategies add to the insecurity created by lack of job tenure

and clearly identifiable career paths'.(Beardwell and Holden, 1997: 598-99) This is somewhat speculative with regard to why people have wanted to become teachers during the period in which the single salary schedule was dominant but it is clearly a legitimate area for historical investigation.

My title borrows from a book by Nietzsche (Nietzsche, 1985) whose contemporary followers in the postmodern movement deny that history can be abused as there is no way of deciding between competing discourses. From this perspective it is impossible to criticise the Wisconsin history for its lack of evidence of change or for not considering that such change to teachers' work is occurring is ideologically driven. Neither does it allow historians to identify normative models of history because for postmodernists all history is normative as it emanates from the will to power. Such a position is disabling for those who wish to study the historical record in order to understand better how to defend groups of workers who are under attack in the present. As Geras has argued, if we do not subscribe to the possibility of establishing the truth there can be no claim to justice (Geras, 1995).

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